

USDA Weekly Retail Turkey Feature Activity

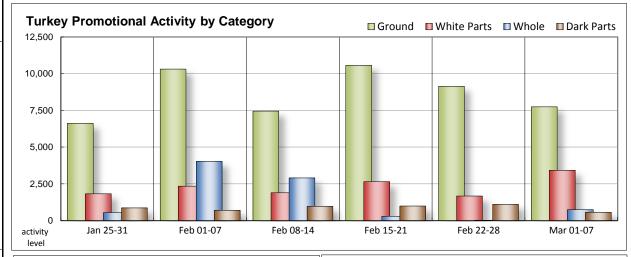
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/01 thru 03/07.

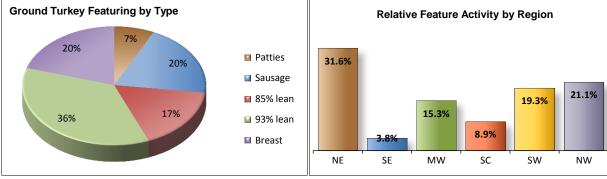
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

(prices in dollars per pour diffess offerwise noted,												
NATIONAL SUMMARY												
	THIS	WEEK	LAST	WEEK	LAST	YEAR						
Feature Rate 1/		of 23,200		of 23,200	31.4% of 22,500 outlets							
		lets		tlets								
Special Rate 4/		1%		.8%	3.2%							
Activity Index 2/		,140		,710	10,390							
3/ WHOLE BIRDS:	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
Fresh - Hens												
" - Toms												
Frozen - Hens	370	1.25	10	1.14	450	1.48						
" - Toms	370	1.25	10		750	1.34						
PARTS:	0/0	1.20	10	1.17	700	1.04						
Breast:												
Bone-in, whole												
Fresh	10	2.49	20	2.79	10	2.99						
Frozen	700	1.73	730		890	1.72						
Split, bone-in												
Fresh			10	2.49								
Rotisserie	2,470	8.27	30	8.52	90	6.61						
Boneless, whole	,		40		60	4.79						
Cutlets	20	3.99	330	4.96	1,380	5.01						
Cutlets, thin sliced	130 4.9		60		,							
Strips			130	4.99	30	4.54						
Tenders	90	4.32	320	4.39	150	4.84						
Marinated Tenders	110	4.76	260	4.11	320	3.48						
Drumsticks	170	2.05	240	1.55	230	1.88						
Thighs	40	2.58	110	1.77	200	2.02						
Wings	190	2.32	260	1.82	200	1.87						
Necks	20	1.39	200	1.51	10	1.39						
Smoked Drumsticks	60	1.93	60	1.99	100	2.16						
Smoked Wings	60	1.92	120	1.99	100	2.16						
Smoked Necks	20	1.74	120		120	1.65						
GROUND TURKEY:	7,740	3.47	9,140	3.51	4,750	3.42						
Patties	550		450		310	3.30						
Sausage	1,540	3.47	1,540		1,070	3.15						
85% lean	1,310	2.35	1,370		680	2.45						
93% lean	2,770	3.25	4,170		1,330	3.34						
Breast	1,570	4.83	1,610		1,360	4.38						
Rolls (frsh/frz 1 lb.)	120	1.00	340	2.43	10	1.69						
Specialty 5/												
Patties	065	4.6-	130		0.55	4.50						
93-94% lean	390	4.27	30		300	4.58						
Breast	60		10		240	7.40						
Note: rolls & specialty no	n included	i iri ground	turkey tota	ai and weigi	neu avera	iye.						

This Week's Turkey Feature Highlights

Retail featuring is more active this week due to heavy promotional activity on rotisserie breasts. Offerings increase on frozen hens and toms; fresh turkeys will have to wait until we are closer to the holiday period. Feature activity and prices decline on fresh and frozen bone-in breasts. This is the week to bring home a rotisserie breast; offerings are plentiful and the average advertised price is lower. Consumers will be hard pressed to find many features on boneless white parts; promotional activity is even slower than last week. Fewer stores are showing dark parts in this week's circulars; prices are higher on fresh parts, lower on smoked parts. Ground turkey feature activity slows; advertised prices are higher on patties and ground breast, lower on the other grinds. Featuring is more active on deli items. The largest increase in service deli offerings is on value products. Self-service deli is heavily promoted, especially the lower priced processor brands.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTH	HEAST U.S.		SOL	JTHEAST U.S.	MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 31.9% of 4,200 sampled outlets				
	(CT,DE,MA,MD,M	E.NH.NJ.NY.PA.I	RI.VT)	(AL.FL.GA.	MS,NC,SC,TN,VA,W					
Feature Rate 1/		0 sampled outle			,100 sampled outle					
Special Rate 4/	0.6% of stores w	/ no-price promo	tions	0.0% of stores	s w/ no-price promo	otions	0.0% of stores w	// no-price promo	tions	
Activity Index 2/		Index = 5,370			vity Index = 890		Activity Index = 2,370			
nound, made	Price Range	Summar	V	Price Range	Summai	γ	Price Range	Summar	V	
	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores V	Vtd Avg	
WHOLE BIRDS:										
Fresh - Hens										
" - Toms										
Frozen - Hens	1.19 - 1.49	210	1.43	1.19	20	1.19				
" - Toms	1.19 - 1.49	210	1.43	1.19	20	1.19				
PARTS:										
Breast:										
Bone-in, whole										
Fresh										
Frozen	1.29 - 1.79	180	1.66	1.29 - 1.79	20	1.58	1.49 - 2.19	190	1.85	
Split, bone-in										
Fresh										
Rotisserie	4.49 - 8.99	870	6.51	6.99 - 8.99	220	8.37	6.99 - 9.99	270	9.87	
Boneless, whole										
Cutlets	3.99	20	3.99							
Cutlets, thin sliced	4.99	130	4.99							
Strips	1.00	100	1.00							
Tenders	3.99	30	3.99				4.49	60	4.49	
Marinated Tenders	4.79	60	4.79				4.33	20	4.33	
Drumsticks	1.49 - 2.99	50	2.31				1.29 - 1.99	100	1.94	
Thighs	2.29 - 2.99	40	2.58							
Wings	1.49 - 2.99	60	2.73	2.99	20	2.99	1.29 - 1.99	100	1.94	
Necks	1.49	10	1.49	2.00			1.29	10	1.29	
Smoked Drumsticks							1.69 - 1.98	20	1.81	
Smoked Wings				1.89	10	1.89	1.69	10	1.69	
Smoked Necks	1.58	10	1.58	1.89	10	1.89				
GROUND TURKEY:										
Patties	3.48 - 5.49	90	4.36	3.49	10	3.49	3.49 - 3.99	200	3.94	
Sausage	3.19 - 3.99	1,310	3.50	3.50	10	3.50	2.87 - 3.49	210	3.27	
85% lean	2.33 - 2.99	540	2.36	1.99 - 2.50	350	2.16	2.33 - 2.66	370	2.50	
93% lean	2.80 - 4.99	760	3.30	2.49 - 3.50	130	3.21	2.79 - 3.98	720	3.28	
Breast (99-100% lean)	4.61 - 5.61	360	5.34	2.80 - 5.38	60	3.53	4.79 - 4.99	80	4.97	
Rolls (frsh/frz 1 lb.)										
Specialty ^{5/}										
Patties										
93-94% lean	3.99 - 5.49	390	4.27							
Breast	5.49 - 6.99	40	6.09	5.49	10	5.49	5.49	10	5.49	



Fri. Mar 01, 2013

USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/01 thru 03/07.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	SOUTH	CENTRAL U.S.		SOUT	HWEST U.S.	NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)				
	(AR,AZ,CO,KS,	,LA,MO,NM,OK,TX	(TU,	(0	CA,HI,NV)					
Feature Rate ^{1/} Special Rate ^{4/} Activity Index ^{2/}	20.7% of 4,2 0.0% of stores v	00 sampled outle w/ no-price promo / Index = 1,370	ts	46.0% of 2,9 0.0% of stores v	00 sampled outlet w/ no-price promo / Index = 2,160		44.7% of 1,200 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 980			
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		
			_				· · · · · · · · · · · · · · · · · · ·			
WHOLE BIRDS:										
Fresh - Hens										
" - Toms										
Frozen - Hens	0.99	140	0.99							
- 10115	0.99	140	0.99							
PARTS:										
Breast:										
Bone-in, whole										
Fresh				2.49	10	2.49				
Frozen	1.49 - 1.99	110	1.75	1.59	20	1.59	1.49 - 1.99	180	1.69	
Split, bone-in										
Fresh										
Rotisserie	8.99	230	8.99	8.99 - 9.99	550	9.48	8.99	330	8.99	
Boneless, whole										
Cutlets										
Cutlets, thin sliced										
Strips										
Tenders										
Marinated Tenders							4.39 - 5.33	30	5.00	
Drumsticks	2.29	10	2.29	1.49	10	1.49			0.00	
Thighs			0			0				
Wings	2.29	10	2.29							
Necks	2.20	10	2.25							
Smoked Drumsticks				1.99	40	1.99				
Smoked Wings				1.99	40	1.99				
Smoked Necks				1.55	40	1.99				
GROUND TURKEY:										
Patties	2.79 - 3.49	50	2.95	3.99	200	3.99				
Sausage	2.13 - 3.43	30	2.55	3.99	10	3.99				
85% lean	2.49 - 2.78	30	2.61	3.21	10	3.21	2.33	20	2.33	
93% lean	2.49 - 2.78 3.50	20	2.61 3.50	2.80 - 3.19	1 000	3.16	2.33 3.19 - 3.59	20 140	2.33 3.51	
					1,000					
Breast (99-100% lean)	3.83 - 4.79 1.00	510 120	4.58 1.00	4.79 - 5.59	280	4.89	4.79	280	4.79	
Rolls (frsh/frz 1 lb.) Specialty 5/	1.00	120	1.00							
Patties										
93-94% lean										
Breast LISBA Assistational B	Andreking Comice Live	stade Daulter C. C		Nove (515) 204 4471	h.t.t.a. / /		/AB4C4 O/LDCB4I		2 -4	



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Mar 01, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 03/01 thru 03/07.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	Υ			NORTHE	AST U.S.	SOUTHE	SOUTHEAST U.S.		
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)		(AL,FL,GA,MS,N	(AL,FL,GA,MS,NC,SC,TN,VA,WV)		
1/	71.5% o	f 23,200	48.3% o	f 23,200	72.9% o	f 22,500	•			· ·		
Feature Rate 1/	sto	res	sto	res	sto	res	89.9% of 4,600	sampled outlets	71.3% of 6,100	71.3% of 6,100 sampled outlets		
Anticitation to Jacobi	40	000	0.4		00	050	Activity Ind	ex = 13,450	Activity In	Activity Index = 8,510		
Activity Index 2/	40,	630	34,	550	39,	650	Price Range	Summary		Price Range Summary		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores V	Vtd Avg	
SERVICE DELI - Turkey												
Category 1												
Processor Brand	4,200	7.75	4,110	7.88		7.93		1,720 7.87	6.99 - 8.99	450	8.52	
Private Brand	3,430	7.37	2,900	7.75	5,400	7.43	6.99 - 10.49	2,410 7.43	7.49 - 7.99	120	7.56	
Category 2												
Processor Brand	2,730	5.81	4,180	5.74	4,950	6.06		850 5.66	4.99 - 6.99	490	6.26	
Private Brand	2,620	6.59	3,640	6.37	4,710	6.96	5.97 - 6.99	760 6.24	5.99 - 6.99	320	6.82	
Category 3												
Processor Brand	1,250	4.17	950	3.84	730	4.12		370 4.13	3.99 - 4.99	340	4.13	
Private Brand	1,450	4.96			150	4.17	3.99 - 4.99	170 4.77	4.99	1,150	4.99	
Turkey Ham												
Processor Brand	240	3.45	440	3.94	560	3.32		100 4.17				
Private Brand	40	3.98					3.98	40 3.98				
Turkey Pastrami												
Processor Brand	260	3.93	400	4.49	270	3.73	3					
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	1,890	7.44	2,650	7.63	4,330	7.33	5.98 - 8.99	670 7.91	5.99 - 8.99	180	7.90	
Private Brand	2,360	6.86	730	7.56	1,360	7.63	5.99 - 8.49	1,640 6.81	7.49	70	7.49	
Category 2												
Processor Brand	310	5.46	110	5.04	430	6.18	3.99	70 3.99				
Private Brand	1,370	5.05	400	5.84	200	5.99	4.99	110 4.99	4.99	1,140	4.99	
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	8,200	3.01	4,540	3.10	5,420	3.10	1.98 - 4.00	2,120 3.16	1.97 - 3.69	1,930	3.08	
Private Brand	640	3.17	2,200	2.82	540	3.03	2.99 - 3.50	210 3.24	2.99 - 3.00	220	3.00	
Turkey 16 oz												
Processor Brand	1,370	4.90	1,050	5.70	1,620	5.07	3.88 - 5.99	220 5.11	4.99 - 5.99	20	5.70	
Private Brand												
Chicken 7-10 oz												
Processor Brand	7,610	3.00	4,140	3.16	5,160	3.12		1,780 3.11	1.98 - 3.69	1,840	3.13	
Private Brand	660	3.16	2,110	2.83	540	3.03	2.99 - 3.50	210 3.24	2.99 - 3.00	240	3.00	

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)





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Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 03/01 thru 03/07.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDW	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTHW	/EST U.S.	NORTHWEST U.S.			
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,LA	A,MO,NM,OK,TX,UT)	(CA,F	HI,NV)	(AK,ID,MT,OR,WA,WY)			
Feature Rate 1/	70.00/ -5.4.000	a seconda di seddada	00 40/ -5 4 00/	Na amaria di anglata	40.00/ - (0.000	lad satisfa				
	72.9% of 4,200 sampled outlets) sampled outlets	·	sampled outlets	78.7% of 1,200 sampled outlets			
Activity Index 2/	Price Range	ndex = 8,630 Summary	Price Range	ndex = 5,750 Summary	Price Range	dex = 2,110 Summary	Activity Index = 2,180 Price Range Summary			
	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg		
SERVICE DELI - Turkey	(ф/рочни)	Clores Wild My	(φ/ροαπα)	Otores Wid My	(ф/рочна)	Otores Wiaring	(φ/ροαίτα)	Otores Wita Avg		
Category 1										
Processor Brand	5.99 - 10.49	940 7.07	6.49 - 7.99	640 7.89	8.99	20 8.99	7.49 - 12.99	430 7.69		
Private Brand	6.99 - 9.99	190 7.27	6.97 - 7.99	580 7.05			7.49	130 7.49		
Category 2										
Processor Brand	4.95 - 6.99	830 5.79	4.99 - 5.99	250 5.57	5.99	170 5.99	4.88 - 5.99	140 5.48		
Private Brand	4.99 - 6.99	850 6.23	5.99 - 7.99	570 7.31	7.99	40 7.99	6.99 - 7.99	80 7.17		
Category 3										
Processor Brand	3.79 - 4.49	350 3.97	3.99 - 4.99	150 4.69	2.99 - 3.99	20 3.49	5.99	20 5.99		
Private Brand	4.99	10 4.99	4.99	120 4.99						
Turkey Ham										
Processor Brand	3.58 - 3.98	20 3.76	3.09 - 3.97	40 3.73	2.17 - 2.99	80 2.33				
Private Brand										
Turkey Pastrami	0.70 7.40	000			0.40	10 0 10	0.00	00 000		
Processor Brand	3.79 - 7.49	220 3.94			3.49	10 3.49	3.98	30 3.98		
Private Brand										
SERVICE DELI - Chicken										
Category 1										
Processor Brand	5.98 - 8.99	660 6.70	5.99 - 8.99	350 7.63	6.99	10 6.99	6.99 - 10.99	20 8.63		
Private Brand	6.99 - 7.99	200 7.26	5.99 - 7.99	320 6.49			7.49	130 7.49		
Category 2 Processor Brand	4.49 - 5.99	240 5.89								
Private Brand	4.49 - 5.99	120 5.64								
SELF-SERVICE DELI	4.99 - 5.99	120 5.04								
(dollars per tub or pouch)										
Turkey 7-10 oz										
Processor Brand	2.00 - 3.49	1,500 2.82	1.79 - 2.50	1,240 2.98	2.50 - 3.99	880 2.92	2.00 - 2.99	530 2.86		
Private Brand	2.99 - 3.50	140 3.41		1,210			3.00	70 3.00		
Turkey 16 oz										
Processor Brand	4.49 - 4.99	780 4.86	3.99 - 4.99	350 4.80						
Private Brand										
Chicken 7-10 oz										
Processor Brand	2.00 - 3.49	1,440 2.82	2.67 - 3.50	1,140 2.99	2.50 - 3.99	880 2.92	2.00 - 2.99	530 2.86		
Private Brand	2.99 - 3.50	140 3.41					3.00	70 3.00		

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)